



State of Wisconsin Department of Public Instruction

Elizabeth Burmaster, State Superintendent

Date: May 23, 2008

To: School District Administrators

From: David Carlson, Director
School Financial Services Team

Re: Final 2007-2008 Revenue Limit Calculation
Final 2007-08 General Aid Eligibility
Final 2007-2008 Special Education Aid Eligibility
2007-08 SAGE Payment Information
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2007-2008 Group and Foster Home Reporting Instructions
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Routing of Information in this Mailing

Please route this information to appropriate district staff. Note that districts will be receiving only one paper copy of this information. However, all of the material in this mailing is posted to the team's website. At the end of this letter is a "Contents Summary" that identifies where this mailing's information can be found. This letter and the "Contents Summary" will also be posted under "Late Breaking Information" on the team's website. For questions contact one of the school finance consultants listed below unless otherwise noted.

Final 2007-2008 Revenue Limit Calculation

The department is required by law to calculate each district's final revenue limit for compliance with s. 121.92(2), Wis. Stats. Enclosed is your district's 2007-2008 final revenue limit computation using data on file at the department as of May 23, 2008. Revenue limit penalties, if any, are noted in the "Results" box on page 2 and reduce the June equalization aid payment to your district. A copy of the Excel worksheet can be found under "Worksheets" on the left hand scan bar on the team's website or directly at http://dpi.wi.gov/sfs/rl_worksheets.html. Membership FTE used to calculate the final revenue limit is found on your district's home reporting page at <https://www2.dpi.state.wi.us/safr/>.

Final 2007-08 General Aid Eligibility

Final eligibility for 2007-08 general aid has been calculated using audited 2006-2007 Annual Report data and final state guarantees. Final general aid adjustments result from comparing the October 15, 2007 estimated aid eligibility and the enclosed final aid eligibility. By statute, aid adjustments are added to or subtracted from your district's 2008-09 September equalization aid payment (payment date is September 15). When your district's 2008-09 general aid payment is certified on October 15, 2008, the 2007-2008 aid differences will be incorporated into your 2008-09 estimated aid eligibility and considered 2008-09 revenue.

Enclosed are your district's "Final Calculation of 2007-08 General Aid" and a "2007-08 Final General Aid Eligibility Adjustment Summary." Membership FTE used to calculate the final aid eligibility is found on your district's home page at <https://www2.dpi.state.wi.us/safr/>."

Final 2007-2008 Special Education Aid Eligibility

Enclosed in this mailing is a worksheet calculation of your district's 2007-2008 final special education categorical aid eligibility. This information is also available on the "Special Education Aid" link on the left hand scan bar of the finance team's website or directly at http://www.dpi.wi.gov/sfs/sped_worksheets.html. Contact Lori Ames by email at lori.ames@dpi.wi.gov or by telephone at (608) 266-3464 should you have questions.

2007-08 SAGE Payment Information – Specific Districts

Final 2007-08 Student Achievement Guarantee in Education (SAGE) payments have been calculated for payment on June 9. To view your district's payment select the "Aid Information" link on the left hand scan bar of the finance team's website or go directly to <http://www.dpi.wi.gov/sfs/SAGE.html>. Additional information about the SAGE program is located at <http://dpi.wi.gov/sage/index.html>. Contact Rachelle Greller by telephone at (608) 266-2489 or by e-mail at rachelle.greller@dpi.wi.gov should you have questions.

2007 School Aid (Spring) Equalized Values

Twice a year, the Wisconsin Department of Revenue (DOR) certifies equalized values to the department for distribution to school districts. In the fall, DOR certifies values to be used by school districts in the tax apportionment of school levy. In the spring, DOR certifies equalized values for the purpose of the next fiscal year's equalization aid computation.

This mailing includes two copies of your district's Spring School District Certification of 2007 Values – School Aid with cover letters. Please forward the district clerk copy to your district's school board clerk. This information is also located under the "Property Valuation" link on the left hand scan bar link on the team's website or directly at <http://www.dpi.wi.gov/sfs/propval.html>.

2007-2008 Group and Foster Home Membership Reporting Instructions – Due June 27

Districts may amend their 2007-2008 pupil count due to pupils residing in certain group and foster homes per s. 121.05(4), Wis. Stats. Enclosed is a cover letter outlining the process to make such a membership adjustment request. Information about Group and Foster Home

Membership Adjustments is available under the “Group and Foster” link on the left hand scan bar of the team’s website or directly at <http://www.dpi.wi.gov/sfs/foster.html>. Contact Debbie Gaffney-Dilley by email at debra.gaffney-dilley@dpi.wi.gov or telephone at (608) 267-9114 should you have questions.

July 1, 2008-09 Aid Estimate using 2007-2008 Budget Report Data

Each year by July 1, the department is required to provide each school district with an aid estimate of general aid for the next fiscal year based upon the best data available on file at the department. Shared cost data for the July 1 aid estimate will be taken from the 2007-08 PI 1504 (SAFR) Budget Reports submitted by school districts. Please ensure that your district’s budget report data reflects any budget amendments approved by your school board during the 2007-08 school year. District budget reports are located under the “School Finance Reporting Portal” link on the team’s website or directly at <https://www2.dpi.state.wi.us/safr/>.

2007-08 PI 1505 Calendar Reporting Instructions – Report is Due August 1

The PI 1505 Calendar Report collects the district’s school calendar and hours of instruction by school per s. 120.006(2)(a), Wis. Stats. This is a required report. Districts can access the PI 1505 Calendar Report by clicking on the “School Finance Reporting Portal” link located at <https://www2.dpi.state.wi.us/safr/> and then proceed to the district’s reporting home page. Click on “Non-Financial Data Home” link to access the report and reporting instructions. This report will open for data entry on May 30 and is due August 1.

PI 1804/1805 2008 Summer School Reporting Instructions – Report is Due October 1

The PI 1804/1805 report collects FTE (full time equivalency) data that is used in the calculation of the district’s revenue limit and equalization aid calculations. This is an optional report. Detailed summer school reporting instructions and the worksheets needed to complete the Internet report are available under the “Summer School” link on the left hand scan bar of the team’s website or directly at http://dpi.wi.gov/sfs/summ_sch.html. The PI 1804/1805 Summer School Report is located within the “School Finance Reporting Portal” located at <https://www2.dpi.state.wi.us/safr/> and will open for data entry on May 30. The report is due on October 1. Contact Brad Adams by email at bradley.adams@dpi.wi.gov or by telephone at (608) 267-3257 should you have questions.

2007-08 PI 1547 Transportation Report Due August 1

The PI 1547 Transportation Report is used to collect data for the payment of categorical transportation aid to school districts per s. 121.58, Wis. Stats. The 2007-2008 PI 1547 Transportation Report is currently open for district data entry and is due August 1. Districts can access this report by clicking on the “School Finance Reporting Portal” link located on the team’s website or directly at <https://www2.dpi.state.wi.us/safr/> and then proceeding to the district’s “Non-Financial Data” home page. Contact Pam Schumacher by email at pamela.schumacher@dpi.wi.gov or by telephone at (608) 267-9205 should you have questions.

Status and Deadlines Update

On each district’s reporting home page located at <https://www2.dpi.state.wi.us/safr/> is a schedule of required and optional data collection reports. This schedule of reports is accessed by clicking

on the “Status and Deadlines” link. The schedule has been updated to include both the remaining 2007-08 reports and the reports that will be collected during the 2008-09 fiscal year. It is recommended that districts review the report schedule to ensure district compliance with the report due dates.

Upcoming Events and Mailings to Districts

Date	Event
May 30	PI 1505 Calendar and PI 1804/1805 Summer School Reports Open for Data Entry
June 2	State Tuition Payment
June 9	State Special Education Aid Payment (25%)
June 9	SAGE Aid Payment (33%)
June 12	District Mailing: 2007-08 June/July Equalization Aid Payments Explanation, 2007-08 Open Enrollment Summaries, New District SAFR Passwords for 2008-09, 2007-08 High Cost SPED Aid Eligibility (specific districts) and PI 1505 Annual, PI 1505 AC, PI 1505 SE, PI 1524 State Tuition, PI 1541/1542 Special Transfer, PI 1570 SPED High Cost Reports Reporting Instructions
June 16	State Equalization Aid Payment (35%)
June 16	Special Transfer Aid Payment
June 16	Special Adjustment Aid Payment
June 16	CCDEB Aid Payment
June 16	High Cost Special Education Aid Payment
June 16	2007-08 PI 1505 Annual Report Opens for Data Entry
June 23	SAGE Debt Service Aid Payment
June 27	Due date for Group/Foster Home Adjustments PI 1589
June 30	Tentative Mailing of Required July 1 2008-2009 General Aid Estimate
July 1	Due Date for Transfer of Service Requests – Excel File;
July 1	2007-08 PI 1505 Calendar/PI 1505 AC Open for Data Entry
July 28	2007-08 Delayed Equalization Aid/Computer Aid Payments

For any additional questions, contact one of the following School Financial Services Team staff.

Brad Adams	bradley.adams@dpi.wi.gov	(608) 267-3752
Lori Ames	lori.ames@dpi.wi.gov	(608) 266-3464
Karen Kucharz Robbe	karen.kucharzrobbe@dpi.wi.gov	(608) 267-9707

The School Financial Services Team website is located at <http://dpi.wi.gov/sfs/>.

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Enclosures: 2007-2008 District Final Revenue Limit Calculation Worksheet
2007-2008 District Final Equalization Aid & Aid Adjustment Worksheets
2007-2008 Special Education Final Aid Eligibility and Worksheet
2007 School Aid (Spring) Equalized Values & Cover Letter –
Administrator/Clerk
Group and Foster Home Adjustments Cover Letter and PI 1589 Worksheet

Contents Summary
School Financial Services Team
May 23, 2008 Mailing to District Administrators

Contents	Included in this Mailing	Location of Information On The SFS Team Website
	May 23 Mailing Cover Letter	Cover Letter is included under “Mailings” on left hand scan bar or directly at http://dpi.wi.gov/sfs/mail0708.html Information is also posted under “Late Breaking Information”
Final 2007-2008 Revenue Limit Calculation	District Specific Final 2007-2008 Revenue Limit Calculation	Revenue Limit Calculation is included under “Worksheets” then “DPI Printed” on left hand scan bar or directly at http://dpi.wi.gov/sfs/rl_worksheets.html Membership FTE Calculation is located at https://www2.dpi.state.wi.us/safr/ then proceed to the district’s reporting home page.
Final 2007-2008 General Aid Eligibility	District Specific Equalization Aid, Aid Membership and Aid Adjustment Worksheets	All Worksheets are included under “Worksheets” then “DPI Printed” on left hand scan bar or directly at http://dpi.wi.gov/sfs/aid_worksheets.html
Final 2007-2008 Special Education Aid Eligibility	Special Education Final Aid Eligibility and District Specific Aid Eligibility Worksheet	Worksheet is included under “Worksheets (DPI Printed)” on left hand scan bar or directly at http://dpi.wi.gov/sfs/sped_worksheets.html . Information is also available under “Special Education Aid” on left hand scan bar or directly at http://dpi.wi.gov/sfs/speced.html
SAGE Aid Eligibility	Payment Information	http://www.dpi.wi.gov/sfs/SAGE.html
2007 School Aid (Spring) Equalized Values (used in October 15 2008-09 Equalization Aid Certification)	Cover Letter and Values for District Administrator and Cover Letter and Values for District Clerk (Please route to Board Clerk)	Cover Letter for District Administrator is included under “Mailings” on left hand scan bar directly at http://dpi.wi.gov/sfs/mail0708.html . District specific School Aid Values are included under “Property Valuation” on left hand scan bar or directly at http://dpi.wi.gov/sfs/propval.html
2007-2008 Group and Foster Home Reporting Instructions	Cover Letter and Form PI 1589 for Reporting 2007-2008 Adjustments	Cover Letter is included under “Mailings” and “Group and Foster” on left hand scan bar or directly at http://dpi.wi.gov/sfs/mail0708.html and http://dpi.wi.gov/sfs/foster.html
July 1 2008-09 Aid Estimate using 2007-2008 Budget Report Data	Data to be used in July 1 aid estimate	Enter the School Finance Reporting Portal link on the team’s home webpage or go directly to https://www2.dpi.state.wi.us/safr/ Proceed to district’s “Finance Data Home” page to amend budget report data
PI 1505 Calendar Reporting	This report collects school calendar	To access the PI 1505 Calendar Report go to the “School Finance Reporting Portal” link located at

Instructions	and school hours data for the 2007-08 school year	https://www2.dpi.state.wi.us/safr/ and then proceed to the district's reporting home page. Click on "Non-Financial Data Home" to access the report.
PI 1804/1805 Summer School Reporting Instructions	Summer 2008 Reporting Instructions	Information and filing instructions are included under "Summer School" on the left hand scan bar or directly at http://dpi.wi.gov/sfs/summ_sch.html . To access the summer school report go to the "School Finance Reporting Portal" link located at https://www2.dpi.state.wi.us/safr/ and then proceed to the district's reporting home page. Click on "Non-Financial Data Home" to access the report.
PI 1547 Transportation Report due August 1	This report collects transportation data for the 2007-08 school year, starting with 2007 Summer School	To access the PI 1547 Transportation Report go to the "School Finance Reporting Portal" link located at https://www2.dpi.state.wi.us/safr/ and then proceed to the district's reporting home page. Click on "Non-Financial Data Home" to access the report.
Status and Due Dates	This is a table listing all required and optional school finance reports	Within the SAFR reporting portal located at https://www2.dpi.state.wi.us/safr/ , proceed to district reporting home page and select "Status and Due Dates" link.